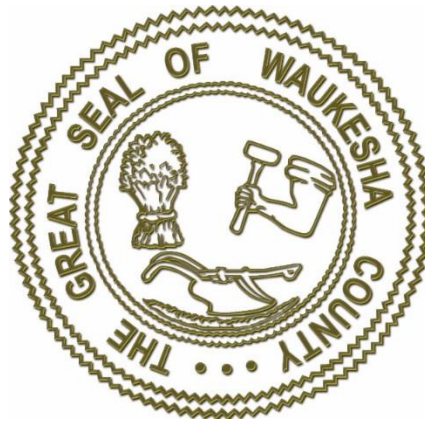




Waukesha County Register of Deeds Strategic Plan 2021 – 2023

Waukesha County's departmental Strategic Plans guide the work of the organization toward achievement of its overall goals.



The Office of the Register of Deeds was established in Wisconsin in 1836. Before that, land registration was handled by the Register in Probate. The 1848 Wisconsin Constitution established the Register of Deeds as a permanent element of the county-level governmental structure. Each county in Wisconsin has a Register of Deeds.

The Register of Deeds files, records, and issues instruments and documents of significance both to the community as a whole and to its individual citizens. Vital records document the span of our lives from birth to death. Land records documenting title in Wisconsin are maintained. The office also maintains land records documenting title in real property in Wisconsin.

During the past 150+ years the Register of Deeds office has utilized advanced technology to handle the increasing work load. From quill pens to computerized indexes to internet accessible documents to electronic filing, these advancements have allowed us to provide a higher level of service to our customers.

Acknowledgements

For their contributions to this document, we recognize and thank the following:

James Behrend – Register of Deeds

Beth Zimmermann – Deputy Register of Deeds

Robert Dunn – Senior Financial Analyst

Dustin Casper – Senior Administrative Specialist, Land Records Division Lead

Tara Eckert – Administrative Specialist, Vital Records Division Lead

Brian Ore – Senior Administrative Specialist, Recording Division Lead

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 *Tip: Click title to jump to **Chapter***

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Reader's Guide: How to read the Strategic Plan

Thanks for reading Waukesha County **Register of Deeds Strategic Plan**.

This document provides an overview of what Waukesha County leadership aims to achieve over the next three years and how this Department aims to meet those goals.

Note: Consider this Strategic Plan a high-level look at problem-solving initiatives. As such, a reader may not encounter data on all departmental activities (as found in an Operational Plan). We welcome your questions and feedback any time!

What's an Objective?

In this Strategic Plan, an Objective is a milestone to be reached. It must be **specific, measurable, attainable, realistic, and time-bound** (aka **SMART**).

Each objective appears in two places: In a list that shows all of our goals in one place, and on its own page (example below, right).

Owner: The member of our team that is accountable for this Objective.

Feel free to contact Waukesha County to discuss any objective – just ask for the person listed here. We do the very same!

Strategy: What must be accomplished in order to achieve our objective.

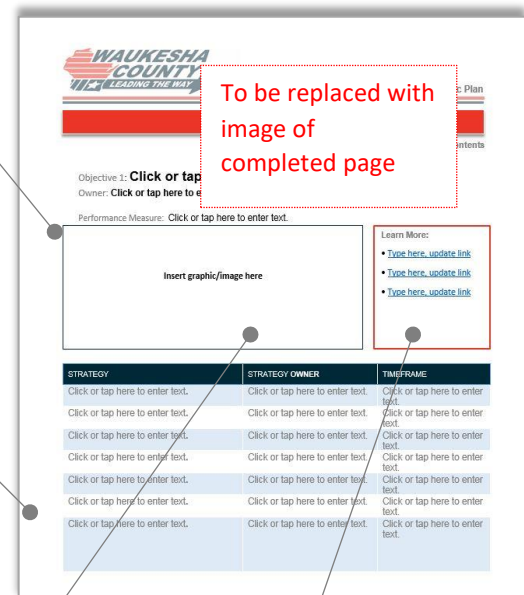
A company that sells fruit snacks may set an objective to "increase sales." One of their strategies is to pioneer new points of sale beyond supermarkets and vending machines, like commercial air travel, pizza delivery, and pro sporting events.

Like each Objective, a Strategy has an **owner** who guides efforts for its completion and success. Find this in the center column.

In the right-hand column, please find the **timeframe** for each strategy. This represents each strategy's deadline.

Performance measures:

A graphic or image show the progress and status of each Objective's success.



To be replaced with image of completed page

Objective 1: Click or tap here to enter text.
Owner: Click or tap here to enter text.
Performance Measure: Click or tap here to enter text.

Insert graphic/image here

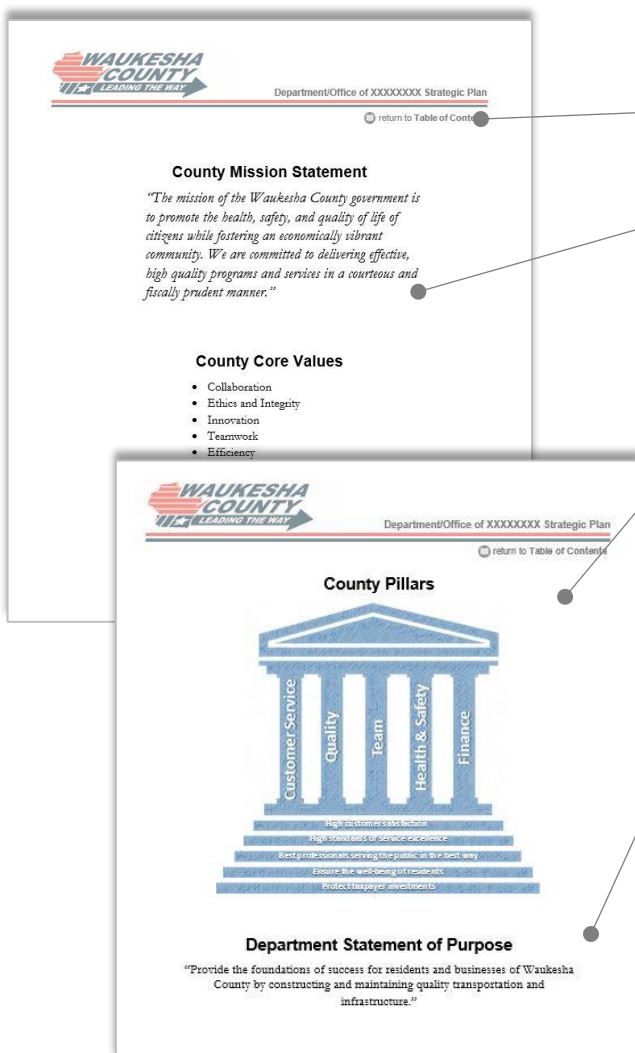
Learn More:
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STRATEGY	STRATEGY OWNER	TIMEFRAME
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Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
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Learn More:

Jump to supporting resources found in this Strategic Plan's appendices, on WaukeshaCounty.gov, or elsewhere!

How to read the Strategic Plan continued



The origin of each Objective

In each of Waukesha County's Departmental Strategic Plans, a pair of pages bears the principles and promises that guide our Objectives:

- Waukesha County's **Mission Statement**. The big picture.
- Waukesha County **Standards of Excellence**, the principles we observe on our path to completing our mission.
- Waukesha County's **Five Pillars of Success**, our framework for identifying core priorities and establishing program goals.
- Department's **Statement of Purpose**. Each department completes a Strategic Plan. Each declares its own "mission" here.

How is the objective shaped by the "environmental scan"?

Environmental scan (n): Monitoring of an organization's internal and external environments for detecting early signs of opportunities and threats that may influence its current and future plans.

Find environmental scan data summarized in this document's **Executive Summary** and **Appendix** sections.



Transmittal Letter

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November 1, 2020

Waukesha County Executive Paul Farrow
Waukesha County Board
Waukesha County Residents and Visitors

The office of the Register of Deeds is pleased to share our 2021-2023 Strategic Plan. The plan was developed by Register of Deeds staff to address the ever-changing world that we live in. What began in the 19th century as a collection of copperplate document books has evolved into millions of documents available online 24 hours a day, 7 days a week. The Register of Deeds office continues to evolve and expand available services to the public.

Governments face many challenges today due to decreasing resources and increasing demand for officials that are willing to make investments today that the citizens will reap the benefits of for years to come, including investments in new technology that will make us more efficient and better able to serve our customers. This strategic plan aims to take into consideration the ever-changing environment and build upon our strengths.

As the keeper of all recorded documents pertaining to land records and vital records in Waukesha County, our office is committed to providing the residents of Waukesha County with an accurate database of information. In addition, our staff pride themselves on delivering friendly, efficient service.

I would like to sincerely thank our leadership staff that helped us create this plan. You can visit our website at www.waukeshacounty.gov/rod to learn more about the services provided by our department.

If you have any questions regarding our strategic plan, please feel free to contact me at 262-548-7586 or by email at jbehrend@waukeshacounty.gov.

James Behrend

Register of Deeds



Executive Summary

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The Waukesha County Register of Deeds Strategic Plan is the roadmap which the department uses to create the vision we hope to achieve. By reviewing the results of prior strategic plans, completing an environmental scan and assessing our strengths, weaknesses, opportunities and threats (SWOT), our department is able to look at the big picture, but also define specific, targeted actions and goals.

Our plan was developed by completing an environmental scan that systematically surveyed and interpreted relevant data to identify external opportunities and threats that could influence future decisions. We utilized data from our department's annual benchmarking records, the Wisconsin Register of Deeds Association, customer surveys and information gathered during the rounding process with department staff.

In addition to surveying and reviewing data, it is important to acknowledge the impact that COVID-19 has had on our department, the County and the world as a whole. Since Wisconsin's first stay at home order was issued in March, 2020, the way we do business has changed. For example, our goal for the last several years has been to increase the number of documents electronically recorded. Electronic recording is more efficient, more cost effective and better for the environment. Prior to March 19, 2020, approximately 92% of all documents recorded in our office were recorded electronically. Since March 19th, nearly 98% of documents have been e-recorded. This shift to primarily electronic recording has resulted in a change in the way we staff our Recording Division, and provides us with the ability to have staff work remotely.

Prior to the safer at home order in March, our office served an average of 250 people per week in person. Thanks to technology, cross training, and LEAN process improvement, we were able to successfully transition 100% of our services to remote offerings in only a matter of days. As businesses started reopening, we implemented an appointment system to better control the flow of in-person customers, while continuing to offer all services via remote options. We have implemented an in-office/remote work schedule rotation that limits the number of staff working in the office at a given time and provides us with continuous staff coverage during business hours, and the ability to efficiently and effectively assist our customers. The changes we have made to adapt to the world today provide us with the flexibility to serve our customers for years to come.

This Strategic Plan reflects our continuing effort to provide an accurate record to the public in an efficient manner. It incorporates a continuing focus on the County's Standards of Service Excellence and our goal of leading the way in service excellence.

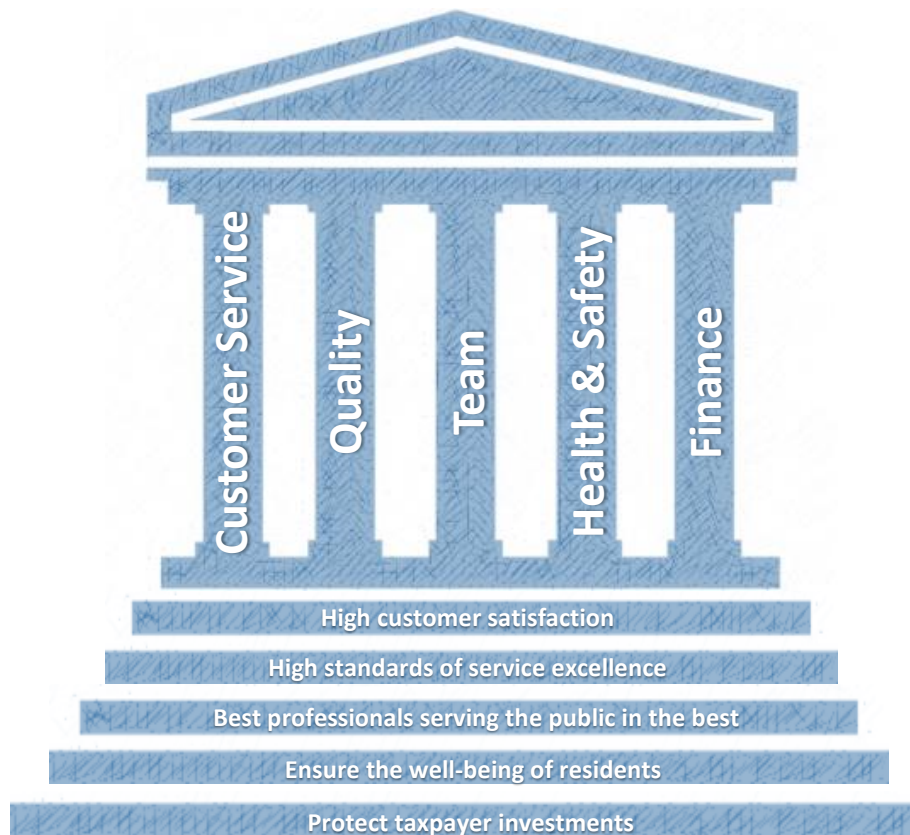
County Mission Statement

“The mission of the Waukesha County government is to promote the health, safety, and quality of life of citizens while fostering an economically vibrant community. We are committed to delivering effective, high quality programs and services in a courteous and fiscally prudent manner.”

Standards of Excellence

- Teamwork & Collaboration
- Communication
- Innovation
- Ethics & Diversity
- Efficiency & Cost Savings
- Wellbeing

County Pillars



Department Statement of Purpose

“Provide the citizens of Waukesha County a depository for safekeeping and public inspection of all legal documents pertaining to Land Records and Vital Records, and to manage the distribution and sale of those records in accordance with Wisconsin Statutes.”

Strategic Objectives at a glance

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- 1) Provide desired services to customers efficiently and effectively.
- 2) Promote real estate and other local business by minimizing risk and turn around time involved in property transactions processed by the Register of Deeds.
- 3) Provide constituents with an irrefutable, reasonably accessible record of births, deaths, marriages and divorces statewide.
- 4) Provide an accurate, searchable index of land records documents, available to customers online 24 hours a day, 7 days a week.

 *Tip: Click title to jump to **objective detail***

Strategic Objectives

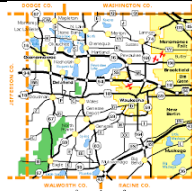
Pillar: Customer Service


[return to Objectives list](#)

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Objective 1: Provide desired services to customers efficiently and effectively.

Owner: Department



Learn More:

[Register of Deeds Website](#)

[General Office Frequently Asked Questions](#)

[Wisconsin Register of Deeds Association](#)

STRATEGY	STRATEGY OWNER	TIMEFRAME
Update website to provide customers with the necessary information for Recording, Vital Records and Land Records	Robert Dunn Dustin Casper	Ongoing
Continue cross-training opportunities between departmental divisions to enhance the fluidity of the workforce and avoid disruption of services.	James Behrend Beth Zimmermann	Ongoing
Utilize Division Team Leaders model to ensure that each division has a leader that can train, guide and assist staff for continuity of service.	Beth Zimmermann Robert Dunn Dustin Casper Brian Ore Tara Eckert	Ongoing
Explore remote hosting opportunities to improve security, service and reliability of cloud-hosted data and applications.	James Behrend Beth Zimmermann Robert Dunn	Q1, 2022
Establish online escrow payment procedure for customers to purchase land records documents online.	Robert Dunn Beth Zimmermann	Q3, 2021
Continue to achieve a 4.65 mean rating for customer service satisfaction.	James Behrend Beth Zimmermann Robert Dunn Dustin Casper Brian Ore Tara Eckert	Ongoing

Pillar: Customer Service

 return to **Objectives list**
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Objective 2: Promote real estate and other local business by minimizing risk and turn around time involved in property transactions processed by the Register of Deeds.

Owner: Recording Division



Learn More:

[Recording Division Website](#)

[Frequently Asked Questions](#)

[Recordable Documents](#)

[Wisconsin Department of Revenue Website](#)

STRATEGY	STRATEGY OWNER	TIMEFRAME
Develop a link with the Wisconsin Department of Revenue to review and approve E-Return information for conveyance documents.	James Behrend Beth Zimmermann Robert Dunn	Q4, 2021
Work with Land Records software developer to create an internal e-recording process, eliminating the need to record paper documents with internal business partners.	James Behrend Beth Zimmermann Robert Dunn Brian Ore	Q2, 2022
Review, analyze and update Recording Division benchmarks to ensure that land records documents are recorded timely and accurately.	Beth Zimmermann Brian Ore	Q2, 2021

Pillar: Customer Service


[return to Objectives list](#)

[return to Table of Contents](#)

Objective 3: Provide constituents with an irrefutable, reasonably accessible record of births, deaths, marriages and divorces statewide.

Owner: Vital Records Division



Learn More:

[Vital Records Website](#)

[Make an Appointment with Vital Records](#)

[How to Submit a Vital Records Application](#)

[State of Wisconsin Vital Records Website](#)

STRATEGY	STRATEGY OWNER	TIMEFRAME
Reconfigure Vital Records customer service area to provide more space for customers, improve flow of customer traffic and provide an improved work environment for Vital Records staff.	James Behrend Beth Zimmermann Robert Dunn Tara Eckert	Q2, 2021
Explore options for online submission of Vital Records applications using current software provider.	Robert Dunn Beth Zimmermann	Q2, 2021
Review daily balancing and auditing of Vital Records documents and security paper processes to identify areas of improvement in security and efficiency.	Tara Eckert Dustin Casper	Q4, 2021

Pillar: Quality

 return to **Objectives list**  return to **Table of Contents**

Objective 4: Provide an accurate, searchable index of land records documents, available to customers online 24 hours a day, 7 days a week.

Owner: Land Records Division



Learn More:

[Land Records Document Search](#)

[How to Purchase Copies of Land Records Documents](#)

[Documents](#)

[Appointment for In-Office Services](#)

STRATEGY	STRATEGY OWNER	TIMEFRAME
Review and update Land Records software to simplify and facilitate the process of recording, indexing and retrieving documents.	James Behrend Robert Dunn Beth Zimmermann	Ongoing
Increase public awareness of the availability of public records and the functions of the Register of Deeds office.	James Behrend Beth Zimmermann	Ongoing
Index back-file images in public access document software back to 1865 to make search function more user friendly.	James Behrend Beth Zimmermann Robert Dunn Dustin Casper	Ongoing
Create link between GIS mapping system and online public access document software to enable customers to select a property on a map and retrieve current, available recorded documents for purchase.	James Behrend Robert Dunn Dustin Casper Land Information Systems Tax Listing	Q4, 2022
Update physical records storage and review long-term storage and archival procedures to ensure the security and longevity of land records.	James Behrend Beth Zimmermann Robert Dunn Dustin Casper Records Management	Q2, 2022
Establish procedure for watermarking bulk/unlimited access documents to prevent duplication for resale and preserve the record.	James Behrend Robert Dunn	Q4, 2021